Appendix I: Case Management Progress Log Documentation for *Provide Enterprise*

Case Managers (CM) will complete a minimum of one progress log per day for each client served. This allows a case manager to complete one progress log that explains all activity and services provided to a client (CL) during the course of a day. Multiple services can be linked to the progress log to account for the different services that may be provided to a client throughout the day.

Listed below are the data fields for progress logs in *Provide Enterprise* along with an explanation of what information belongs in the field.

Status: This refers to the status of the progress log record. If the record is "In Progress" then it can be edited. When the data entry is fully complete for the record, then the status needs to be changed to "Complete" by either changing this field or clicking the "✓Complete" button on the top of the record.

(Note: Only documents marked with a status of "Complete" will count on reports.)

Provider: This is the person who provided the service to the client. Usually this is the case manager who is entering in the progress log and this field automatically defaults to the *Provide Enterprise* (PE) user's name for the computer that is being used.

Date: The date that the contact was made with the client, or on behalf of the client.

Start Time: This field can capture the exact time the CM/provider began working with or on behalf of the client to provide services. Since exact time is not required, this field usually just depicts the time that the progress log record was created/started.

Minutes: The total time of the activity/activities with a client, or on the client's behalf, including documentation time. It is required that time be tracked in 15 minute increments.

Contact Category: This field provides information on where the progress log should be mapped to (counted) on the Ryan White Data Report (RDR).

- *Case Management Services (used for Nonmedical CM documentation)
- Health Promoter (used by providers who are classified as "Health Promoters" and who are providing Health Promotion services)
- HIV Posttest Counseling (used by providers (typically prevention staff) who are doing HIV Posttest counseling with clients)
- HIV Pretest counseling (used by providers (typically prevention staff) who are doing HIV Pretest counseling with clients)
- Linguistic Services (used by providers who are providing clients with translation services directly)
- *Medical Case Management (used by Ryan White case managers who are providing medical case management services)
- Medical Nutrition Therapy (used by registered dieticians who are providing clients with nutritional services/counseling)
- Mental Health Services (used by a licensed mental health provider who is providing counseling/therapy services to a client)
- Outreach Services (used by providers to document their services related to getting HIV+ individuals into care)

- Prevention Case Management (used by providers who are working with clients in regards to risk reduction/secondary prevention)
- Psychosocial Support Services (used by providers who only provide clients with psychosocial support- not case managers)
- Substance Abuse Treatment (used by providers who are professionally qualified/licensed to counsel/address substance abuse problems with a client)

*Typically case managers will use the category of Case Management Services or Medical Case Management to document all of their activities.

Contact Type: Provides information on how the CM provided services to a client.

- Care Conference (used to document case staffing completed on the client)
- Client Contact Clinic/Hospital (used to document a meeting with the client in a clinic or hospital setting- this is meant to be outside of the case manager's typical office setting, so if the CM works in a clinical setting, he/she would not use this type)
- Client Contact Electronic (used to document contact with the client via email)
- Client Contact Home (used to document contact made with the client at his/her home)
- Client Contact Jail/Prison/Detention Center (used to document contact made with the client in a jail, prison, or detention center setting)
- Client Contact Letter (used to document contact made with the client via letters)
- Client Contact Office (used to document contact made with the client at the CM's office setting)
- Client Contact Other (used to document contact made with the client when no other option is appropriate)
- Client Contact Telephone (used to document contact made with the client via telephone)
- Client Contact Treatment Facility (used to document contact made with the client at a treatment facility)
- *Collateral Contact Electronic (used to document contact made on the client's behalf via email)
- *Collateral Contact Letter (used to document contact made on the client's behalf via letter)
- *Collateral Contact Other (used to document contact made on the client's behalf when no other option is appropriate)
- *Collateral Contact Telephone (used to document contact made on the client's behalf via telephone)
- Documentation (used to capture the time spent documenting for a client's record; no contact is actually made with the client or on behalf of the client with another individual)
- Supervision (used to document the time a supervisor spends on the client's case/chart; this may be as documentation, client contact, or collateral contact so the contact flag and description fields should be used to help explain the exact contact made with the client or on the client's behalf)
- Admin. - Letter (used by administrative staff to document that they sent the client, or someone on the client's behalf, a letter)
- Admin. - Medical Records (used by administrative staff to document that they released or requested medical records for the client)
- Admin. – Other (used by administrative staff to document contact made with the client, or on the client's behalf, when no other option is appropriate)
- Admin. – Telephone (used by administrative staff to document that they speak with the client, or someone on the client's behalf, via telephone)

When documenting all activity with a client AND on behalf of a client in one progress log per day, Case Manager's will need to prioritize their contacts in the following order:

1. Made: Face to Face with CL
2. Made: Not Face to Face with CL

3. Made: Face to Face Collateral Contact
4. Made: Not Face to face Collateral Contact
5. Attempted: CL Contact
6. Attempted: Collateral Contact
7. None: CM Documentation/No direct contact with the client or on the client's behalf

*Collateral contact is any contact not made directly with the client despite the client's age, mental capacity, etc.

Contact Flag: This notes whether the contact type was **made, attempted,** or **none.**

- **Made** contact is when the CM actually speaks with or meets with the CL, CL's family, other service providers/agencies about the CL's care. **Made** contact also includes any contact from the CL, collateral contacts (e.g. CL's family), or service providers to the CM. Examples include voice mails left for the CM by the CL; letters to the CM from the CL; emails from the CL to the CM.

- **Attempted** contact is any attempt from the CM to contact the CL, collateral contacts, and other service providers about the CL's care. **Attempted** contact includes letters to the CL from the CM; messages left for clients or their collateral contacts. (Note: **Attempted contacts will count on Productivity reports but not on Programmatic Reports, such as RDR (formerly CADR) or HOPWA APR.)**

- **None** should be used when the CM has no direct involvement with a CL or CL's collateral contacts and no service is being delivered. Examples may include a CM documenting that a CL was a "no show" for an appointment or when a CM is working on a client's file or service plan just for organizing or filing. . (Note: **Contacts with "None" will count on Productivity reports but not on Programmatic Reports, such as RDR (formerly CADR) or HOPWA APR.)**
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Face to Face Flag: Indicates if the client contact or collateral contact was done in person or not.

Funding Source: This field provides information on which funder is paying for the contact that was made with the client or on the client's behalf. Usually for case management services, the funder will be Ryan White. However, each agency has to determine which contacts are provided by which funders. Multiple funders are listed as possible selections for this field.

Brief Description: A 2-3 word description of the activity with the CL/services provided.

Full Description: Detailed professional/legal documentation of activities and services delivered by the CM. The progress log should be free of slang, professional opinions, and minimal abbreviations.